




HIGHLIGHTS OF THE **m**•MOTIVITY INTEGRATION

CHOOSE YOUR METRIC

- Presentation views (#)
- Presentation to credit reports (%)
- Presentations to applications (%)
- Funded loans with presentations (Units)
- Funded loans with presentations (%)

EVALUATE YOUR STATS AT-A-GLANCE

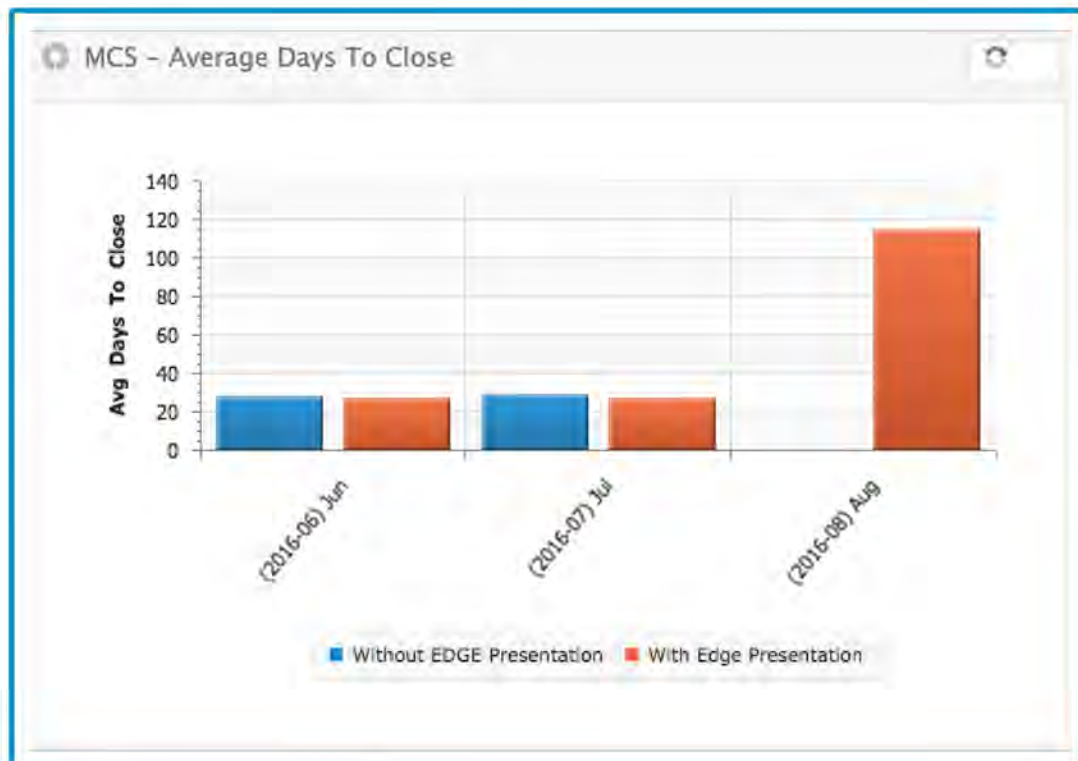
-  • Percentage changes
-  • Forecast growth or drops
-  • Ranks
-  • View goals



HOW TO READ & USE THE MOTIVITY INTEGRATION

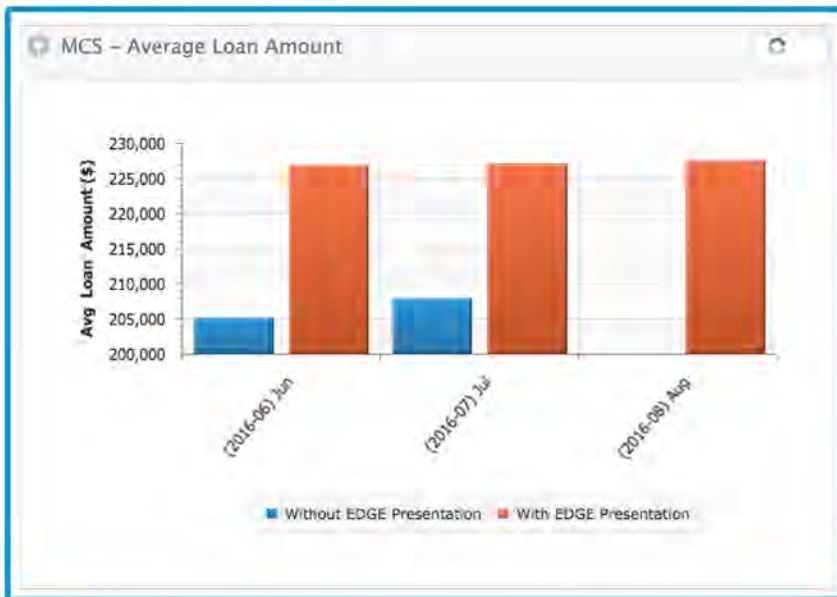
ON THE FRONT PAGE

There are 3 graphs:



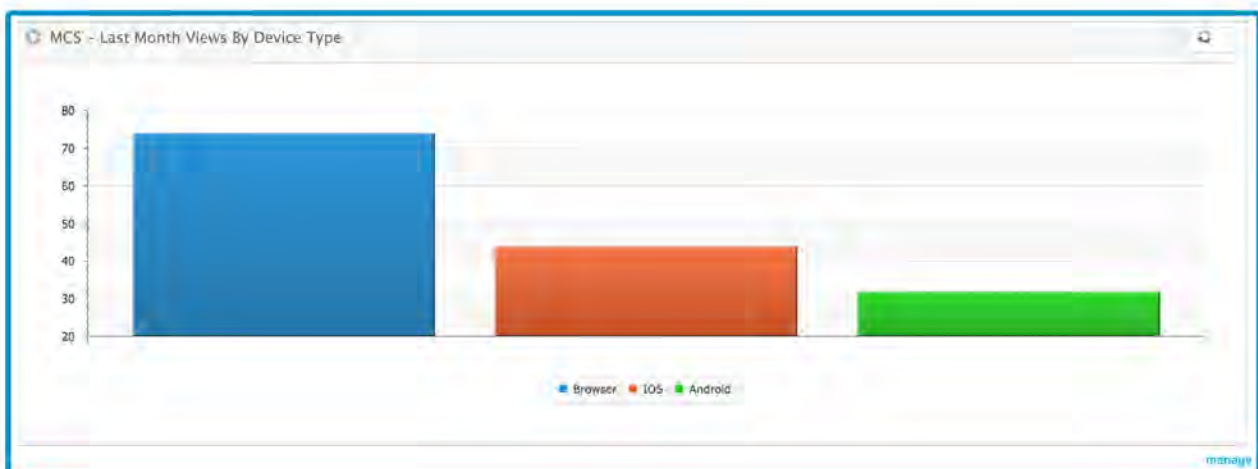
AVERAGE DAYS TO CLOSE

After a successful implementation, you should monitor this chart to see there is no indication of loans closing without presentations and simply see your month to month average days to close. As you monitor results, you should see clients commit noticeably faster when they receive a Mortgage Coach Total Cost Analysis. This measurement can also be used to monitor long term marketing. Therefore, you can interpret a successful measurement as being a lesser number of average days, meaning you are successfully reaching and nurturing a larger audience in a more effective time span.



AVERAGE LOAN AMOUNT

With a successful implementation, you should monitor this chart to ensure growth in the number of transactions that include presentations. However, when managing the education of advice-based mortgage selling and the introduction of the Total Cost Analysis, you should be able to see clearly that borrowers that are presented all their options can confidently make a mortgage decision and tend to have a higher loan amount than those being presented only price.



LAST MONTH VIEWS BY DEVICE TYPE

Growing lenders know client commitments and repeat retention require ongoing value, delivered throughout the sales process and post-closing. Illustrating the speed and volume of presentations viewed by device type helps quantify your organization's success at creating a critical ongoing contact point with higher readership than postal materials or email, to ensure your ability to influence in the future.

ON THE FRONT PAGE

There are 5 metrics:



PRESENTATION VIEWS

Understanding the total number of unique Total Cost Analysis presentations viewed will enable you to ensure the savings and content presented is resulting in upward trends. You should see an average of 2.5 times the total number of presentations created monthly if the TCA is being shared as intended.



PRESENTATION TO CREDIT REPORTS

When implementing the best practices to ensure consistent borrower experiences, the percentage of presentations to credit reports should be ideally be 100% or more. If you run credit, even if they appear currently not fundable, you should ensure your brand is present on their mobile device to be able to reach that prospect effectively, now and in the future, as well as demonstrate a superior experience for their circle of influence.



PRESENTATIONS TO APPLICATIONS

To achieve fair transparency for all types of clients in any community, the percentage of presentations to applications should always be 100%. Simple integrations, automation, and additional reporting is available to audit and ensure every application includes an accurate Total Cost Analysis.



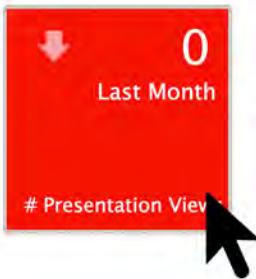
FUNDED LOANS WITH PRESENTATIONS (UNITS)

Trending the number of funded units with a presentation illustrates the expected increase in client-specific opportunity to manage a client for life relationship and influence additional referrals and transactions with a periodic mortgage review.

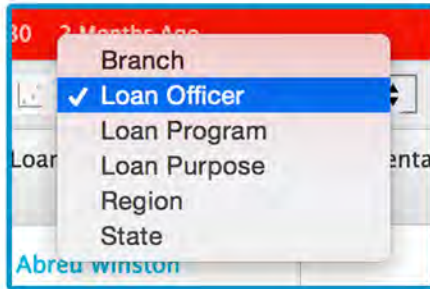


FUNDED LOANS WITH PRESENTATIONS (%)

Funded Loans without a presentation are a missed opportunity to retain your influence post-closing. 100% of your funded clients should have your best advice available anytime. Presentations delivered are available and saved on a client's favorite device indefinitely, allowing you to reach them when it matters most.



CLICK ON A METRIC



VIEW YOUR STATS

according to a variety of organizational categories: **BRANCH, LOAN OFFICER, LOAN PROGRAM, LOAN PURPOSE, REGION, OR STATE.**

Loan Officer	# Presentation Views	Forecast	Rank	Goal	% Goal	Previous # Presentation Views	Growth	
Cejka Alex	0		10	1	1	0%	1	-100%
Chamberlain Joba	0		5	1	0	0%	0	0%
Compton Erik	1		10	1	13	0%	13	-97%
Concha Carlos	0		5	1	3	0%	3	-100%
Coutlangus Jonathan	7		5	1	0	0%	0	140%
Cranford Jeffrey	11		5	1	0	0%	0	110%

COMPARE HOW EACH ARE DOING

in each set of data: **# OF PRESENTATION VIEWS, FORECAST, RANK, GOAL, % GOAL, PREVIOUS # PRESENTATION VIEWS, AND GROWTH.**

MCS - Main

Loan Officers: Andrew Cleaveland, Query Filter: Report View Event Not Blank, between 8/1/2015 and 8/1/2016

Borrower Name: Contains

Borrower Name	Loan Number	Analysis ID	Branch	Loan Officer	Loan Amount	Credit Pulled Date	Application Date	Edge Browser Views	Edge Android Views	Edge iOS View	Total Views	Funding Date
Borrower5015706	5008902.971	1034550	Blings	Carman Franklyn	398,624	06/27/2016	06/30/2016	6	10	16	16	07/31/2016
Borrower5017072	5009674.432	1027915	Jackson	Carman Franklyn	431,674	06/23/2016	06/26/2016	3	5	8	8	07/27/2016
Borrower5017206	5009750.11		Wichita Falls	Carman Franklyn	434,916	06/27/2016	06/30/2016	0	7	7	7	07/31/2016
Borrower5017222	5009759.146	1039964	Sandy Springs	Carman Franklyn	435,303	06/23/2016	06/26/2016	11	21	32	32	07/27/2016

DRILL DOWN TO THE DETAILS

by clicking on the name, state, program, etc.